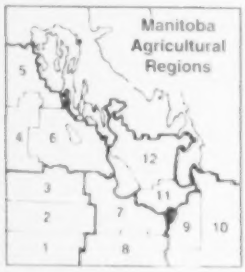
PROGRAM & POLICY ANALYSIS

Agriculture Statistics



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SUBJECT: **MANITOBA AGRI-FOOD EXPORTS, TO THE UNITED STATES, 1993 - 2004**

- Preliminary data show Manitoba exports to the US at $1.54 billion in 2004, 1.5% more than in 2003, but still 3.2% below the record $1.59 billion in 2002.
- Manitoba's agri-food exports to all destinations were $3.405 billion in 2004, down from $3.101 billion in 2003.
- The US accounted for 45.2% of Manitoba's total exports in 2004, down from 48.9% in 2003, including 16.4% of the total unprocessed exports, 85.7% of the semi-processed exports, and 64.8% of the processed exports.
- Combined hog and pork exports to the US dipped in 2002, but increased 7.7% between 2002 and 2003 and 7.8% between 2003 and 2004. Hog and pork exports to the US totaled $549.3 million in 2004, which included virtually all hogs and 46% of total pork exports to all destinations.
- Live ruminant exports were halted following confirmation of bovine spongiform encephalopathy (BSE) in a cow in Alberta on May 20, 2003. In September, 2003, a number of countries, including the US and Mexico, allowed a resumption of imports of specified Canadian boneless beef products. Live animal exports to the US were not resumed until July 2005.
- US import tariffs were imposed on Canadian wheat during 2003, beginning March 4 at 3.94%, and increasing by August 29 to 14.15% on Spring wheat and to 13.55% on Durum wheat. The Durum tariffs were removed on October 4, 2003, while the Spring wheat tariffs were maintained. A NAFTA trade panel has ordered the US International Trade Commission (ITC) to reconsider the tariffs.

Unprocessed/Bulk:

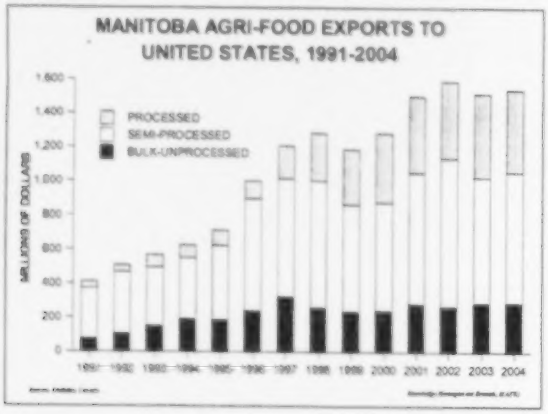
- Unprocessed or bulk exports accounted for 18.8% of Manitoba's total exports to the US in 2004. Bulk exports, primarily field crops, were valued at $289.8 million, 1.1% more than in 2003.
- In 2004, bulk oat exports totaled $113.8 million, while bulk wheat exports were $7.6 million.
- In 2004, Manitoba exported $59.4 million in bulk canola to the US, but imported $187.1million worth of US canola for seed and crushing.

Semi-Processed/Intermediate:

- Semi-processed exports accounted for 49.7% of the total exported to the US, and were primarily products from hogs, canola oil and meal, and pulse crops. Exports were a near-record $767 million, 4.1% more than 2003.
- Canola oil exports were $185.1 million with meal exports of $61.0 million, a combined increase of 29.4% over 2003. That represents 96.3% of Manitoba's total canola oil exports and all of the meal exports.
- Manitoba's live cattle and bison exports were all attributed to direct US shipments. These dropped to $106.7 million in 2003, less than 40% of the 2002 value, and to zero in 2004. In 2003, an estimated 97,354 head of live cattle were exported to the US, 37% of 2002.
- Exports of hogs to the US were valued at $352.4 million in 2004, 27.6% more than in 2003, virtually all of Manitoba's hog export value.

Processed/Consumer:

- Processed exports accounted for 31.5% of Manitoba's total exports to the US, and were primarily potato products, pork and honey. Processed exports totaled $485 million in 2004, 2.2% less than 2003.
- Approximately 46.1% of Manitoba's processed pork exports go to the US and virtually all processed beef. Processed pork exports totaled $196.9 million in 2004, 15.6% less than in 2003, while processed beef exports totaled only $3.6 million, an increase of 38.6%.
- Processed potato exports to the US totaled a record $239.6 million in 2004, 18.9% more than in 2003, and 93% of Manitoba's total processed potato exports to all destinations, compared to 98% in 2003.



DATA SOURCE: Statistics Canada, Agriculture and Agri-Food Canada.

Knowledge Management Branch; PH: (204) 945-4017/3503
July 26, 2005

105-07230/

MANITOBA AGRI-FOOD EXPORTS TO THE UNITED STATES, 1993 – 2004

COMMODITY	1993	1994	1995	1996	1997	1998	1999	2000[R]	2001[R]	2002[R]	2003[R]	2004[P]
	- millions of dollars -											
UNPROCESSED/BULK:												
Durum Wheat	3.5	3.7	4.3	2.3	4.1	3.0	4.8	0.8	2.0	7.2	0.1	0.8
Other Wheat	31.0	46.0	30.0	38.4	65.3	45.6	48.2	48.4	72.0	57.9	8.0	6.8
Barley	10.7	24.0	15.2	14.9	20.5	16.0	13.1	8.1	20.4	8.0	5.4	9.0
Oats	31.3	23.3	40.8	75.2	102.2	61.5	62.7	83.5	87.8	84.3	122.2	113.8
Rye	1.4	2.5	1.9	4.4	8.0	5.1	3.9	4.9	5.2	5.1	5.4	10.9
Canola	13.2	29.6	18.2	27.0	30.9	43.7	25.4	19.0	18.4	15.8	16.8	59.4
Flaxseed	15.8	18.2	23.6	27.5	38.7	28.2	25.2	11.4	6.7	8.5	16.1	16.4
Mustard Seed	8.5	8.4	9.9	11.5	10.2	4.8	4.6	4.9	6.9	5.4	7.8	8.7
Canary Seed	2.2	4.4	4.3	5.6	3.8	3.4	2.7	3.0	3.3	7.0	8.6	3.3
Sunflower Seed	13.2	10.0	13.5	7.2	8.9	13.4	11.9	18.0	24.7	35.3	38.7	26.5
Forage Seeds	14.4	16.5	21.8	19.4	26.0	30.0	28.8	32.5	28.8	21.7	23.9	21.5
Other Bulk	4.0	2.7	1.8	2.0	3.1	3.7	3.2	5.4	5.4	8.6	33.5	12.5
TOTAL BULK	**149.2**	**189.3**	**185.3**	**235.5**	**321.5**	**258.3**	**234.6**	**240.1**	**281.6**	**264.9**	**286.6**	**289.8**
SEMI-PROCESSED/INTERMEDIATE:												
Wheat Flour	0.4	11.9	9.5	0.0	0.0	0.6	0.7	1.9	4.0	4.1	4.0	3.2
Oat Groats, Meal & Flakes	6.8	10.5	11.8	19.1	23.2	25.2	27.5	26.6	38.4	31.1	31.3	27.0
Lentils	0.5	0.7	0.8	0.7	0.8	0.9	1.0	0.5	0.4	0.7	1.1	0.9
Dry Peas	3.7	3.9	3.8	3.8	6.0	5.5	4.5	3.9	3.0	5.0	5.8	5.6
Dry Beans	5.0	4.9	5.3	6.8	6.9	6.7	10.2	18.3	35.7	47.4	34.7	35.7
Refined Sugar	12.1	29.2	12.7	5.4	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Canola Oil	28.4	43.6	92.4	148.7	129.6	175.5	129.2	88.5	82.1	130.5	160.8	185.1
Canola Meal/Cake	27.6	31.2	30.9	49.4	50.8	53.6	33.7	27.2	24.7	30.2	29.4	61.0
Linseed Oil	0.0	0.3	1.1	1.6	2.4	2.4	4.3	3.8	2.6	4.6	4.0	2.6
Flax Fibre/Tow/Waste	8.8	12.9	18.5	27.4	26.2	30.7	27.3	23.3	21.1	11.0	12.8	13.5
Malt	0.8	0.7	1.3	1.2	0.0	0.3	2.5	4.7	0.4	0.7	0.2	0.0
Other Vegetable Oils	5.7	5.8	11.9	15.5	11.5	2.5	1.1	1.5	1.0	1.1	2.6	3.2
Egg Albumin	0.1	0.1	0.6	1.5	0.4	1.3	0.3	0.4	0.3	1.8	0.9	8.0
Cattle/Bison	182.3	138.0	145.1	186.5	222.0	238.4	176.8	188.3	257.7	273.2	106.7	0.0
Hogs	45.5	40.6	67.6	154.8	164.0	155.8	165.3	207.3	247.5	246.0	276.2	352.4
Sheep	1.2	1.8	3.5	4.6	6.5	6.3	5.6	4.3	4.6	5.5	2.6	0.0
Cattle Hides	2.0	1.7	0.6	0.2	0.3	0.2	0.2	0.1	0.1	0.0	0.0	0.0
Hay/Alfalfa Pellets, etc.	1.5	2.6	2.1	3.3	5.6	3.0	1.8	2.0	2.0	1.8	1.8	1.4
Other Animal Feeds	5.8	8.1	6.4	11.2	18.5	18.1	13.1	9.8	10.8	22.9	19.0	22.5
Other Live Animals	4.9	6.6	8.0	10.5	12.4	13.6	14.7	12.9	18.5	17.6	12.5	13.9
Other Intermediate	3.8	4.9	4.6	7.4	6.4	5.1	9.6	11.6	12.6	34.4	30.5	30.9
TOTAL INTERMEDIATE	**346.9**	**360.0**	**438.5**	**659.6**	**694.0**	**745.8**	**629.2**	**636.8**	**767.4**	**869.9**	**737.1**	**767.0**
PROCESSED/CONSUMER:												
Beef	7.5	5.8	3.4	3.1	4.3	4.9	6.4	6.2	4.6	4.4	2.7	3.6
Pork	36.4	47.2	47.2	35.3	72.0	91.4	128.0	231.1	255.1	227.1	233.4	196.9
Eggs, Yolks/Dried	2.0	1.6	0.7	0.8	0.3	0.1	1.0	1.7	3.4	4.5	3.3	0.4
Potatoes, Fresh	1.6	2.2	4.6	5.8	1.9	3.7	4.1	3.4	6.1	8.2	6.9	3.6
Potatoes, Processed	7.8	2.6	5.9	35.7	87.4	140.5	143.2	127.2	141.2	160.4	201.5	239.6
Honey	5.0	4.2	10.4	6.7	6.7	11.4	14.9	16.8	16.1	31.2	23.1	18.5
Beverages	3.8	3.1	3.0	1.1	0.1	2.1	4.3	4.6	3.8	1.4	2.1	2.1
Other Consumer[1]	7.7	10.3	15.4	17.6	18.6	23.3	21.6	15.9	20.4	21.7	23.0	20.4
TOTAL CONSUMER	**71.8**	**77.0**	**90.6**	**106.1**	**191.3**	**277.4**	**323.5**	**406.9**	**450.7**	**458.8**	**495.9**	**485.0**
TOTAL EXPORTS	**568.0**	**626.3**	**714.6**	**1,001.2**	**1,206.9**	**1,281.5**	**1,187.4**	**1,283.9**	**1,499.7**	**1,593.5**	**1,519.6**	**1,541.7**
TOTAL IMPORTS FROM THE U.S.[2]	**313.1**	**368.5**	**423.9**	**445.7**	**495.6**	**573.0**	**596.1**	**602.6**	**655.4**	**852.0**	**791.0**	**693.8**

[1] Includes re-exports of tobacco and coffee.
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